



SATERN

System for Administration, Training, and Educational Resources for NASA

External Training Requests

Classroom Guide

(Version 5.8 SP5)

April 2010





For SATERN v 5.8 SP5

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From the NASA SATERN Program Office:

All SATERN administrator training materials must be used alongside the SATERN Rules and Process Guide for administrators. The Guide identifies areas where SATERN functionality cannot enforce the Agency-defined usage of the system at NASA and provide guidance to enable administrator compliance with Agency-defined methods and procedures.



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Course Introduction

Through discussion, demonstration, and hands-on computer lab work, the goal of this guide is to establish a working understanding of the concepts associated with external training requests, also referred to in SATERN as SF-182 Requests. The lessons in this guide discuss creating an external request; and submitting, verifying, editing, and generating external training request reports. You will gain basic skills in how to use external training request using step-by-step, hands-on lab exercises.

OBJECTIVES

Upon completion of this course, you will be able to:

- Describe the external training request process
- Create and submit a new external training request
- Verify and approve external training request
- Run external training request reports

TARGET AUDIENCE





This training is intended for SATERN administrators responsible for:

- ◆ Assisting learners and supervisors with completing external training request

USING THIS GUIDE

This classroom guide is designed to be used in conjunction with an instructor. The guide provides general information that will be elaborated upon by the instructor. For additional information, refer to the online help.

Throughout the guide, you encounter icons that call out various types of information. The following table illustrates how this guide uses icons to indicate different types of comments, activities, labs, etc. that support the text.

Icon	Definition
	Activity: Indicates an activity for you to complete that helps reinforce the information you just learned.
	Note or Tip: Indicates additional information that is related to the information presented. It also provides helpful hints and tips or other guidance that further explains the information it accompanies.
	Lab: Indicates a hands-on computer lab. Follow the step-by-step process outlined to perform specific tasks in the system.
	Warning: Warns against particular actions, or that a particular condition might indicate a problem.

ADDITIONAL RESOURCES

There are a number of additional resources that can provide you more information about the SATERN system. There may be specific guidelines for your Center. If there is any question go your Center SAL.

These resources include:

- ♦ Online SATERN system help
- ♦ Task-specific job aids



- ◆ The five-step external training process:
 - <https://saterninfo.nasa.gov/documents/57927-SATERN%20External%20Training%20Guide%20FINAL%201-05-10.pdf>
- ◆ External training requests for users and supervisors:
 - https://saterninfo.nasa.gov/documents/SATERN_UPDATE/SATERN%20External%20Training%20for%20Users%20and%20Supervisors%2010_27_09%20FINAL.pdf



Notes

Lesson 1:

External Training Request Process

The goal of this lesson is to establish a general understanding of the external training request process in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Define the external training request process
- Describe the process flow for external training requests

EXTERNAL TRAINING REQUESTS

The external training request process is a multi-step process that creates a record of external training in the learner's Learning History. Learners fill out the External Training Request form (SF-182) when they want training that takes place outside of SATERN. The training could be, for example, a seminar or a workshop organized by a professional society. After it is submitted, the request is routed to the training approval process, and then is approved or denied by the learners' admin or supervisor.

The external training request enables administrators to:

- ◆ Establish a submission process for external training request
- ◆ Establish a verification process for external training request
- ◆ Create a new request for a learner
- ◆ Edit a request
- ◆ Run the external training request reports

The external training request enables learners to:

- ◆ Request external training through SATERN
- ◆ Initiate the verification process upon return from the training
- ◆ Track the status of their request/verification

A learner (or an admin) initiates the process by completing the External Training Request form (SF-182) (Figure 1) and submitting it to request training. The submission and verification processes require learners to obtain the necessary approvals before attending external training and to verify their attendance after the training has taken place.

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING					
SECTION A: TRAINEE INFORMATION					
B. Record Action					
<input checked="" type="radio"/> Add					
A.1. Applicant's Name					First Five Letters of Last Name
Last Name	First Name	Middle Initial	WINTER		
WINTERS	CHASE	S			
A.4. Home Address			* A.5. Work Phone	* A.6. Position Level	
Street Address			(202) 358-2580	<input type="radio"/> a. Non-supervisory <input type="radio"/> b. Manager	
City	State / Province	Postal Code	Country	<input type="radio"/> c. Supervisory <input type="radio"/> d. Executive	
A.7. Organization Mailing Address			* A.8. Work Fax	* A.9. Work Email Address	
* Organization				Chase S. Winters@nasa.gov	
* Address					
* City	* State / Province	* Postal Code			
* A.10. Position Title	A.11. Does applicant need special accommodations?		If yes, please describe below		
	<input type="radio"/> Yes <input checked="" type="radio"/> No				
A.12. [TRAINING OFFICE] Category	* A.13. Education Level	* A.14. Pay Plan	A.15. [TRAINING OFFICE] Direct Cost Code	* A.16. Grade	A.17. [TRAINING OFFICE] Sub-Category
	18	GS		13	
SECTION B: TRAINING COURSE DATA					
B.1a. Name and Mailing Address of Training Vendor					
You may either search for, and select a vendor, or, manually enter in the vendor information.					
<input checked="" type="radio"/> ID <input type="text"/>		Name <input type="text"/>		<input type="radio"/> Other If Other, please specify <input type="text"/>	
* Street Address	* City	* State/Zip	* Vendor Fax	* Country	

B.1b. Location Of Training Site					<input type="checkbox"/> If Same, mark box.	
* Street Address		* City	* State/Zip	* Vendor Fax	* Country	
<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
B.1c. Vendor Email Address				* B.1d. Vendor Telephone Number		
<input type="text"/>				<input type="text"/>		
* B.2a. Course Title		B.2b. Catalog/Course Number		* B.3. Training Start Date (MM/DD/YYYY)		* B.4. Training End Date (MM/DD/YYYY)
<input type="text"/>		<input type="text"/>		<input type="text"/> <small>(MM)</small>		<input type="text"/> <small>(MM)</small>
* B.5. Training Duty Hours		* B.6. Training Non-Duty Hours		* B.7. Competency		
<input type="text"/>		<input type="text"/>		-- Please Select One --		
B.9. [TRAINING OFFICE] Training Type/Sub Type Code		B.10. [TRAINING OFFICE] Training Delivery Type Code		B.11. [TRAINING OFFICE] Training Designation Type Code		* B.12. Credit Hours (if academic credit, if not academic, then enter 0)
-- Please Select One --		-- Please Select One --		-- Please Select One --		<input type="text"/>
B.14. [TRAINING OFFICE] Training Accreditation Indicator		B.15. Continued Service Agreement Required Indicator		B.16. Continued Service Agreement Required Expiration Date		B.17. [TRAINING OFFICE] Training Source Type Code:
<input type="radio"/> Yes <input type="radio"/> No		<input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> N/A		<input type="text"/> <small>(MM)</small>		-- Please Select One --
* B.18. Course Objectives and Justification				B.19. [TRAINING OFFICE] Indirect Cost Code		
<input type="text"/>				<input type="text"/>		
SECTION C: COSTS AND BILLING INFORMATION						
C.1. Direct Cost and appropriation/fund chargeable				C.2. Indirect Cost and appropriation/fund chargeable		
Item	* Amount	Appropriation Fund		Item	* Amount	Appropriation Fund
a. Tuition	\$ <input type="text"/>	<input type="text"/>		a. Travel	\$ <input type="text"/>	<input type="text"/>
b. Books or Materials	\$ <input type="text"/>	<input type="text"/>		b. Per Diem	\$ <input type="text"/>	<input type="text"/>
c. Total	\$ <input type="text"/>			c. Total	\$ <input type="text"/>	
C.3. Total Training Non-Government Contribution Cost				* C.6. User Comments/Training Office Comments/Billing Instructions (Info about vendor/course website, registration forms if needed, etc.)		
\$ <input type="text"/>				<div style="border: 1px solid black; height: 150px; width: 100%;"></div>		
C.4. [TRAINING OFFICE] Document / Purchase Order / Requisition No						
<input type="text"/>						
C.5. [TRAINING OFFICE] WBS Code						
<input type="text"/>						

Note: This agreement must be signed by the nominee for Government training that exceeds 80 hours (or such other designated period, less than 80 hours as prescribed by the agency) for which the Government approves payment of training costs prior to the commencement of such training. Nothing contained in this SAMPLE agreement below shall be construed as limiting the authority of an agency to waive, in whole or in part, an obligation of an employee to pay expenses incurred by the Government in connection with the training.

Continued Service Agreement

Employees, who are selected to training for more than a minimum period as prescribed in Title 5 USC 4108 and 5 CFR 410.309, see your supervisor for more information on the internal policies to implement a continued service agreement.

Employees Agreement to Continue in Service

To be completed by applicant:

1. I AGREE that, upon completion of the Government sponsored training described in this authorization, if I receive salary covering the training period, I will serve in the agency three (3) times the length of the training period. If I received no salary during the training period, I agree to serve the agency for a period equal to the length of training, but in no case less than one month. (The length of part-time training is the number of hours spent in class or with the instructor. The length of full-time training is eight hours for each day of training, up to a maximum of 40 hours a week).

NOTE: For the purposes of this agreement the term "agency" refers to the employing organization (such as an Executive Department or Independent Establishment), not to a segment of such organization.

2. If I voluntarily leave the agency before completing the period of service agreed to in item 1 above, I AGREE to reimburse the agency for fees, such as the tuition and related fees, travel, and other special expenses (EXCLUDING SALARY) paid in connection with my training. These fees are reflected in Section C Costs and Billing Information. Note: Additional information about fees and expenses can be found in the Guide to Human Resource Reporting (GHRR). <http://www.opm.gov/feddata/ghrr/index.asp>
3. I FURTHER AGREE that, if I voluntarily leave the agency to enter the service of another Federal agency or other organization in any branch of the Government before completing the period of service agreed, I will give my organization written notice of at least ten working days during which time a determination concerning reimbursement will be made. If I fail to give this advance notice, I AGREE to pay the full amount of additional expenses 5 U.S.C. 4108 (a) (2) incurred by the Government in this training.
4. I understand that any amount of money which may be due to the agency as a result of any failure on my part to meet the terms of this agreement may be withheld from any monies owed me by the Government, or may be recovered by such other methods as are approved by law.
5. I FURTHER AGREE to obtain approval from my organization and the person responsible for authorizing government training requests of any proposed change in my approved training program involving course and schedule changes, withdrawals or incompletions, and increased costs. I acknowledge that this agreement does not in any way commit the Government to continue my employment. I understand that if there is a transfer of my service obligation to another Federal agency or other organization in any branch of the Government, the agreements will remain in effect until I have completed my obligated service with that other agency or organization.
6. I acknowledge that this agreement does not in any way commit the Government to continue my employment. I understand that if there is a transfer of my service obligation to another Federal agency or other organization in any branch of the Government, the agreements will remain in effect until I have completed my obligated service with that other agency or organization.

- Period of obligated Service: _____
- Employee's Signature: _____
- Date: _____

Submit

Figure 1. External Training Request Standard Form 182 (SF-182)

PROCESS FLOW FOR EXTERNAL TRAINING REQUESTS

Figure 2 illustrates the process flow for handling external training requests in SATERN.

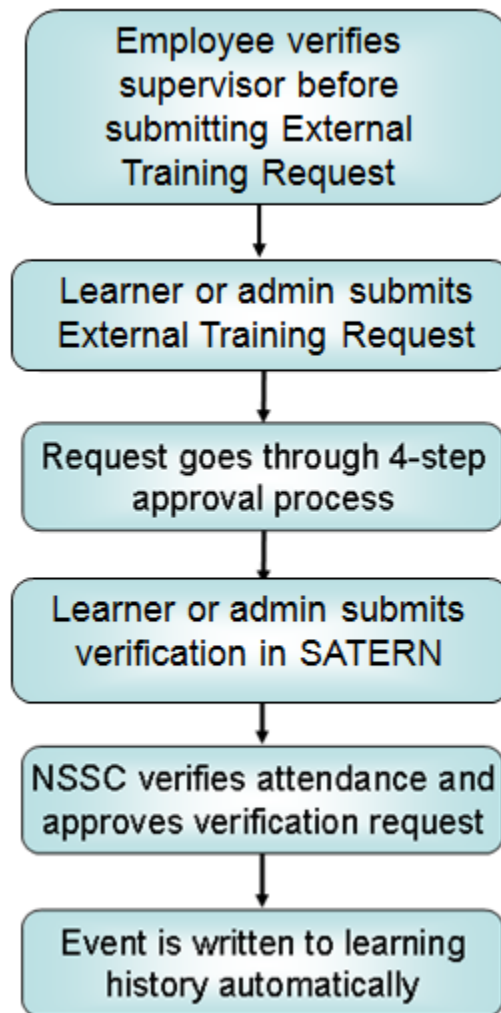


Figure 2. Standard Process Flow for External Training Requests



CONCLUSION

In this lesson, you learned how to define the external training request process in SATERN.

You should now be able to:

- Define the external training request process
- Describe the process flow for external training requests



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

Only a learner (and not an admin) can create a new external training request.

2. True or false:

The external training request must be verified and approved before a record is written into the learner's Learning History.



Notes

Lesson 2: Requesting External Training

The goal of this lesson is to teach you how to request external training using the external training request process.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Create a new request as a learner (or admin)
- View an existing request as a learner (or admin)
- Edit an existing request as an admin

CREATING/VIEWING EXTERNAL TRAINING REQUEST AS A LEARNER

From the SATERN application, learners can request to attend one or more learning opportunities (courses, seminars, conferences) that take place outside of the organization. When completing external training requests for conferences refer to the Rules and Process guide. The external training request form is used for this purpose.

To create an external training request as a learner:

1. Employee must first verify his/her supervisor. On the learner side of SATERN, navigate to **Personal > Profile > Employee Information** section. If the supervisor is incorrect, update before completing an external training request.

2. Navigate to **Learning > External Training Requests** in the top menu.

The *Request, Authorization, Agreement & Certification of Training* screen displays (Figure 3).

Request, Authorization, Agreement & Certification of Training

Below is a list of all of your SF-182 Requests. Click the Request ID for more information about the request. Click **Copy Request** or **Withdraw Request** button and click **Go** to Copy or Withdraw from an SF-182 Request. Click the **New Request** button to initiate a new request.

Request ID	Title	Status	Pending Approval Actions	Action
49917	INTRODUCTION TO PROJECT MANAGEMENT	Approved	Pending Verification	Copy Request Verify

[New External Request](#)

Figure 3. Request, Authorization, Agreement & Certification of Training Screen

3. Click **New External Request**.

The *Request, Authorization, Agreement & Certification of Training* screen displays the request form (Figure 4).

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING

SECTION A: TRAINEE INFORMATION

B. Record Action

[Add](#)

A.1. Applicant's Name

Last Name: DAVIS-COURY, First Name: LANE, Middle Initial: , First Five Letters of Last Name: DAVIS

A.4. Home Address

Street Address: , City: , State / Province: , Postal Code: , Country:

*** A.5. Work Phone**: (650) 604-6335

*** A.6. Position Level**

☐ a. Non-supervisory ☐ b. Manager
☐ c. Supervisory ☐ d. Executive

A.7. Organization Mailing Address

* Organization: OSHA TRAINING INSTITUTE CENTER, * Address: P.O. BOX 93686

*** A.8. Work Fax**: , *** A.9. Work Email Address**: ldcoury@kso.com

Figure 4. Learner Interface: External Training Request (SF-182 Form)

4. Fill in the required fields (marked with a red *****) and any other appropriate information.



5. **Completing the Comments Box:** The 182 Form does not have boxes for the User Comments or the Training Office Comments. It was recommended that Box C6 on the SF-182 label be changed to “User Comments/Training Office Comments/Billing Instructions” thus creating a multi-use comments box in 5.8.

NASA Business Rule

Learners, SATERN Administrators, NSSC Approvers should place their comments in Box C6 *User Comments/Training Office/Comments/Billing Instructions* on the SF-182 form. The newest comments should be placed at the top of the comments box under a header prior to the next section. Headers should be all caps and dated as follows: **USER COMMENTS xx/xx/xxxx** **TRAINING OFFICE COMMENTS xx/xx/xxxx**, **BILLING INSTRUCTIONS xx/xx/xxxx**.

6. Click **Submit**.

The *Approval Submission* screen displays (Figure 5).

Approval Step	Approvers
Initial Approval	Supervisor Level 1 (Show All)
Training Coordinator	TRAINING COORDINATOR (Show All)
Training Office	TRAINING OFFICE (Show All)
NSSC Procurement	NSSC PROC (Show All)

Figure 5. Learner Interface: Approval Submission

7. View the NASA's 4-step approval process: Initial Approval, Training Coordinator, Training Office, NSSC Procurement.
8. *Optional:* Click the **Show All** link to view the name of the supervisor assigned to approve the request.
9. Click **Submit**.



10. Review the confirmation message (Figure 6).

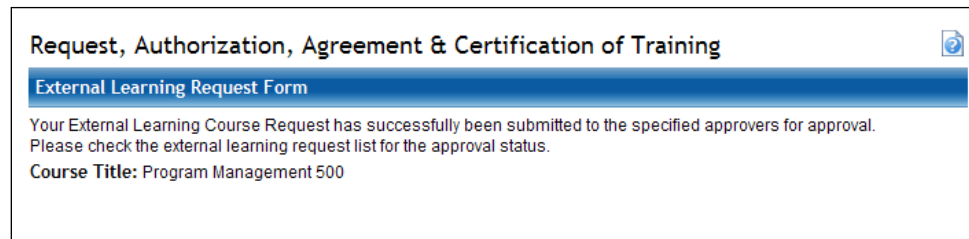


Figure 6. Confirmation Screen

VIEWING THE EXTERNAL TRAINING REQUEST

Learners must navigate to **Learning > External Training Requests** from the top menu to view the requests they made, and see the following request information:

- ◆ Request ID
- ◆ Title of the request
- ◆ Status of the request
- ◆ Pending approval actions
- ◆ Action buttons

To view and print the external training request:

1. Log in to the SATERN learner interface.
2. Navigate to **Learning > External Training Requests** from the top menu.
3. On the *Request, Authorization, Agreement & Certification of Training* screen, click the buttons in the Action column to copy the request or withdraw the request (Figure 7).

System for Administration, Training, and Educational Resources for NASA

Personal Learning Career Catalog Reports

Request, Authorization, Agreement & Certification of Training

Below is a list of all of your SF-182 Requests. Click the Request ID for more information about the request. Click **Copy Request** or **Withdraw Request** button and click **Go** to Copy or Withdraw from an SF-182 Request. Click the **New Request** button to initiate a new request.

External Training Requests Viewing Options: All requests

Request ID	Title	Status	Pending Approval Actions	Action
49939	PMP Certification Prep	Submitted	Pending Initial Approval	Copy Request Withdraw Request

[New External Request](#)

Figure 7. Learner Interface: View External Training Request

- Click the link under the **Request ID** column to view additional details of a submitted request on the *External Learning Request Details* screen.
- Click **Printable Version** to open this form in a printable format in a separate browser window (Figure 8).

External Learning Request Details

[Back](#)

Training Request ID: 49939
 Course Title: PMP Certification Prep
 Vendor Name: ABC Technologies
 Training Start Date: 4/26/2010 PST
 Training Complete Date: 4/30/2010 PST

Request Status: Submitted

External Learning Request Details

[View Actual Request](#)

[Printable Version](#)

AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING

SECTION A: TRAINEE INFORMATION

B. Record Action

Add

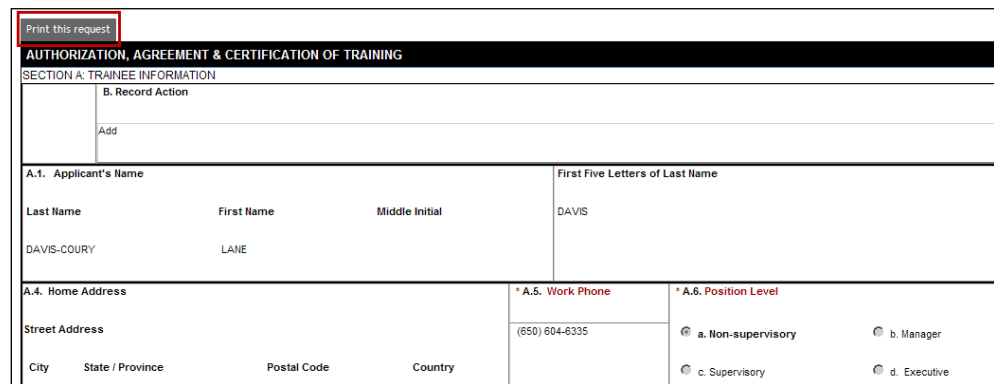
A.1. Applicant's Name

Last Name	First Name	Middle Initial	First Five Letters of Last Name
DAVIS-COURY	LANE		DAVIS

A.4. Home Address **A.5. Work Phone** **A.6. Position Level**

Figure 8. Learner Interface: External Learning Request Details Screen

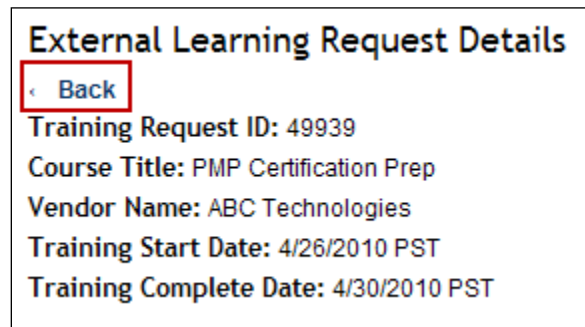
6. In the separate browser window, click **Print this request** at the upper-left corner to print this request (Figure 9).



AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING			
SECTION A: TRAINEE INFORMATION			
B. Record Action			
Add			
A.1. Applicant's Name			First Five Letters of Last Name
Last Name	First Name	Middle Initial	DAVIS
DAVIS-COURY	LANE		
A.4. Home Address		* A.5. Work Phone	* A.6. Position Level
Street Address		(650) 604-6335	<input checked="" type="radio"/> a. Non-supervisory <input type="radio"/> b. Manager
City	State / Province	Postal Code	<input type="radio"/> c. Supervisory <input type="radio"/> d. Executive

Figure 9. Learner Interface: Printable View of External Training Request Form

7. Close the window to return to the *External Learning Request Details* screen.
8. Click the **Back** link (Figure 10) to return to your list of external training request.



External Learning Request Details

[Back](#)

Training Request ID: 49939

Course Title: PMP Certification Prep

Vendor Name: ABC Technologies

Training Start Date: 4/26/2010 PST

Training Complete Date: 4/30/2010 PST

Figure 10. Learner Interface: External Learning Request Details Screen

CREATING/VIEWING EXTERNAL TRAINING REQUEST AS AN ADMIN

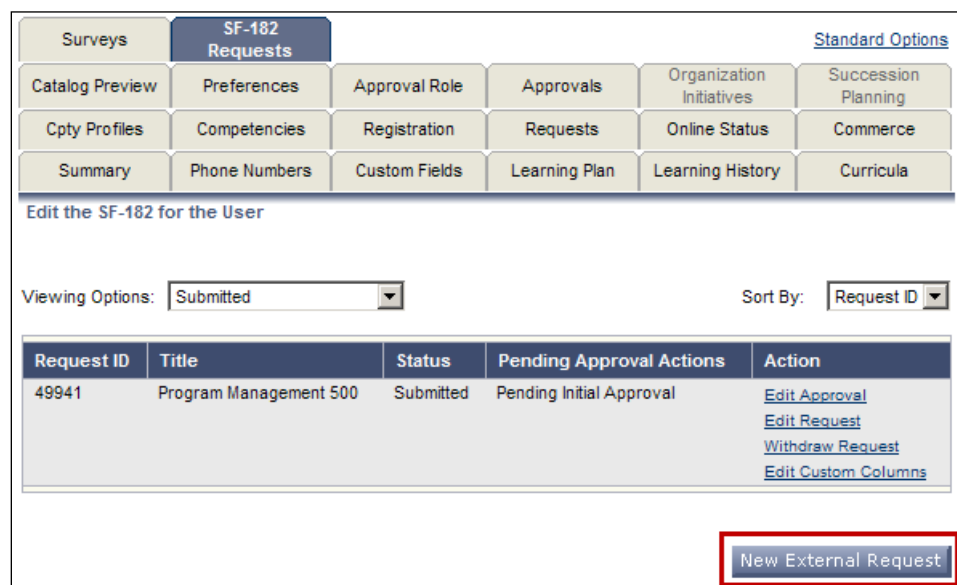
A SATERN admin can create a new request on behalf of a learner. Typically, this is not necessary since learners complete exactly the same form on the learner side as admins can create on the admin side.

Creating a Single External Request

Scenario: The learner is out of the office without access to SATERN. An admin can create and submit a new external training request for the learner. The submitted request then initiates the approval process.

To create a single request:

1. Search for the learner to submit a request.
2. Access the learner record in edit mode.
3. Select the **SF-182 Requests** tab.
4. Click **New External Request** (Figure 11).



The screenshot displays the 'SF-182 Requests' tab within a learner record. The interface includes a top navigation bar with tabs like 'Surveys', 'SF-182 Requests', and 'Standard Options'. Below this is a grid of sub-tabs including 'Catalog Preview', 'Preferences', 'Approval Role', 'Approvals', 'Organization Initiatives', 'Succession Planning', 'Cpty Profiles', 'Competencies', 'Registration', 'Requests', 'Online Status', 'Commerce', 'Summary', 'Phone Numbers', 'Custom Fields', 'Learning Plan', 'Learning History', and 'Curricula'. The 'Requests' sub-tab is active, showing a table of requests. The table has columns for 'Request ID', 'Title', 'Status', 'Pending Approval Actions', and 'Action'. A single request is listed with ID 49941, titled 'Program Management 500', and status 'Submitted'. The 'Action' column for this request contains links: 'Edit Approval', 'Edit Request', 'Withdraw Request', and 'Edit Custom Columns'. At the bottom right of the page, a button labeled 'New External Request' is highlighted with a red rectangular box.

Figure 11. Learner Record > SF-182 Requests Tab > New External Request

The new external training request screen opens in a separate browser window (Figure 12).

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING				
SECTION A: TRAINEE INFORMATION				
B. Record Action				
<input type="button" value="Add"/>				
A.1. Applicant's Name				First Five Letters of Last Name
Last Name	First Name	Middle Initial	DAVIS	
DAVIS-COURY	LANE			
A.4. Home Address			* A.5. Work Phone	* A.6. Position Level
Street Address			(850) 604-6335	<input type="radio"/> a. Non-supervisory <input type="radio"/> b. Manager
City	State / Province	Postal Code	Country	<input type="radio"/> c. Supervisory <input type="radio"/> d. Executive
A.7. Organization Mailing Address			* A.8. Work Fax	* A.9. Work Email Address
* Organization	OSHA TRAINING INSTITUTE CENTER			lcoury@kso.com
* Address	P.O. BOX 93686			

Figure 12. New External Training Request Form for Learner

5. Enter all required information and any other additional information as appropriate.
6. Scroll to the bottom of the screen.
7. Click **Submit** to submit the request for the learner.

The Approval Submission screen displays (Figure 13).

Approval Submission		Help
> Submit for Approval		
The item/request selected requires approval using the steps listed below.		
Any step that do not have a user listed must have a name filled in before the request can be submitted.		
Approval Step	Approvers	
Initial Approval	Supervisor Level 1	(Show All)
Training Coordinator	TRAINING COORDINATOR	(Show All)
Training Office	TRAINING OFFICE	(Show All)
NSSC Procurement	NSSC PROC	(Show All)
Return to External Request		<input type="button" value="Submit"/>

Figure 13. Admin Interface: Approval Submission for the Learner

8. Click **Submit**.

The request window closes and you are returned to the SF-182 Requests tab of the learner record (Figure 14).

Request ID	Title	Status	Pending Approval Actions	Action
49942	CPR Certification	Submitted	Pending Initial Approval	Edit Approval Edit Request Withdraw Request Edit Custom Columns
49941	Program Management 500	Submitted	Pending Initial Approval	Edit Approval Edit Request Withdraw Request Edit Custom Columns

Figure 14. SF-182 Requests Tab: Learner Record

Creating a Request for Multiple Learners

Scenario: Let's say that a manager has made arrangements for a group of learners to attend a course. It would be efficient for you to create one request, and then copy the request for the other learners.

You can create the request and submit it for the first learner. At the same time, you can copy the request for other employees. The copied form retains details about the event from the first learner, and picks up details specific to the second learner.

To create requests for multiple learners:

1. Search for and access in edit mode the learner record for the first learner.
2. Select the **SF-182 Requests** tab.



3. Click **New External Request** and generate a training request.
4. Enter all required information and any other additional information as appropriate.
5. Scroll to the bottom of the screen.
6. Before submitting the request, check the **Save Data for Another Request** checkbox at the bottom of the screen (Figure 15).

☐ Submit Request as Approved ☒ Save Data for Another Request Select Learner Submit Reset

Figure 15. Checkbox to Create Multiple Requests

7. Continue the submission process for Learner 1 by clicking **Submit**.

You are returned to the request screen where Learner 1 details still populate the form.

8. Scroll to the bottom of the screen and click **Select Learner** to display the *Search Learner* screen.
9. Search for and select Learner 2.

You are returned to the request screen where Learner 2 details populate the form.

10. Repeat as needed – unchecking the **Save Data for Another Request** checkbox before submitting the request for the last learner.



Lab 1. Create Training Requests for Two Learners

Scenario: A supervisor has made arrangements for two employees to attend the same training event. The supervisor has asked you to create the requests for both learners.

Locate two learners with the same supervisor. Record their learner IDs below. Select a future date that will not result in a conflict for each learner to attend this event.

Learner A _____

Learner B _____

Step

1. Navigate to the **SF-182 Requests** tab for the learner record of Learner A.
2. Click **New External Request**.
3. **Enter** the appropriate information to complete the form.



Note: Be sure to enter all the required fields (marked with *) for the learner. (Training Office Use) highlighted in blue text are completed by the Training Office.

4. Check the **Save Data for Another Request** checkbox.
5. Click **Submit**.
6. View the approval process. Click **Submit** again.
7. You are returned to the external request screen. Scroll to the bottom of the screen and click **Select Learner**.
8. Search for and select Learner B. You will return to the request screen where Learner B details populate the form.
9. Uncheck the **Save Data for Another Request** checkbox and submit the request for Learner B.
10. After submitting the form, notice that you are now in the learner record for Learner B.

UPDATING AN EXISTING REQUEST AS AN ADMIN

Depending on what part of the process an external training request is in, the admin may have the ability to edit the approval for the request, edit the request, withdraw the request, view the request, or edit custom columns. On the SF-182 Requests tab of a learner record, the Action column displays the possible choices for each request (Figure 16).

Surveys	SF-182 Requests	Standard Options			
Catalog Preview	Preferences	Approval Role	Approvals	Organization Initiatives	Succession Planning
Cpty Profiles	Competencies	Registration	Requests	Online Status	Commerce
Summary	Phone Numbers	Custom Fields	Learning Plan	Learning History	Curricula

Edit the SF-182 for the User

Viewing Options:

All requests

Sort By:

Request ID

Request ID	Title	Status	Pending Approval Actions	Action
49943	SATERN Admin Summit	Approved	None	View Request Edit SF-182 Request Transfer Request Verify Edit Custom Columns
49940	Leading Effective Change	Submitted	Pending Initial Approval	Edit Approval Edit Request Withdraw Request Edit Custom Columns
49939	PMP Certification Prep	Submitted	Pending Training Coordinator	Edit Approval Edit Request Withdraw Request Edit Custom Columns

New External Request

Figure 16. Admin Update Action Options

Prior to Submission Approval

If the external training request is awaiting approval during the submission part of the process, the admin may:

- ◆ Click **Edit Approval** to either approve or deny the request
- ◆ Click **Edit Request** to make changes to the form

- ◆ Click **Withdraw the Request** to remove the request
- ◆ Click **Edit Custom Columns** to populate additional information

To edit the learner approval:

1. Click **Edit Approval** in the Action column.

The *Edit Learner Approvals* screen displays (Figure 17).

Learners
[Search](#) | [Add New](#) | [Help](#)

[> Search](#) > [Search Results](#) > [Edit Learner Approvals](#)

User Name: cwinters
Name: WINTERS, CHASE S
Approval ID: 235617
Title: CPR Certification

[Back](#)

Edit Learner Approvals

Approval Step	Approver	Approved	Date Completed	Approve Approve All	Deny
Initial Approval	THOMAS J HOWARD	No		<input type="radio"/>	<input type="radio"/>
Comments:					
Training Coordinator	CAROLYN W NEWSOME (Show All)	No		<input type="radio"/>	
Comments:					
Training Office	CAROLYN W NEWSOME (Show All)	No		<input type="radio"/>	
Comments:					
NSSC Procurement	ROBIN E SCHENCK (Show All)	No		<input type="radio"/>	
Comments:					

[Apply Changes](#)
[Reset](#)

Figure 17. Edit Learner Approvals Screen

2. Click the **Approve** or **Deny** radio button as appropriate to approve or deny the request.



Note: If you click the **Approve All** link, you will select all levels for approval. Use this option cautiously!

Figure 18 illustrates the approval screen after the admin has selected the radio button to approve just the first step. Notice that a clear audit trail is possible by carefully entering an explanation in the **Comments** field.

Often learners are not receiving approval for scheduled offerings and/or external training in a timely manner due to the unavailability of supervisors to approve the training.

NASA Business Rule

If a learner's supervisor is unavailable to approve the scheduled offering and/or external training request in a timely manner, the Center Level 1 Administrator can approve the training with a written authorization (e-mail) from the learner's supervisor to approve the training for the learner.

The administrator should use the comments field to include remarks that reflect that the approval was made by the Level 1 Administrator on behalf of the supervisor. Administrators should not "super-approve" the Training Office step, because training codes cannot be entered.

Approval Step	Approver	Approved	Date Completed	Approve Approve All	Deny
Initial Approval	CHASE S WINTERS	No		<input checked="" type="radio"/>	<input type="radio"/>
Comments: Submitting approval on behalf of Chase Winters per email message on April 6, 2010					
Training Coordinator	ANDREW A SCHORR	No		<input type="radio"/>	<input type="radio"/>
Comments:					
Training Office	TAMARA D BOLDEN (Show All)	No		<input type="radio"/>	<input type="radio"/>
Comments:					
NSSC Procurement	ROBIN E SCHENCK (Show All)	No		<input type="radio"/>	<input type="radio"/>
Comments:					
<input type="button" value="Apply Changes"/> <input type="button" value="Reset"/>					

Figure 18. Learner Record > Edit Approval Screen



Note: The screen capture is a representation of approver names. The SATERN screen will display all approver names for each step.

3. Click **Apply Changes** to save the updated request.

Figure 19 shows a screen after a SATERN admin has approved the request on behalf of the first approver in the process.

Approval Step	Approver	Approved	Date Completed	Approve Approve All	Deny
Initial Approval	Chase Winters	Yes	4/6/2010 America/Indianapolis	<input checked="" type="radio"/>	<input type="radio"/>
Comments: Submitting approval on behalf of Chase Winters per email message on April 6, 2010					
Training Coordinator	ANDREW A SCHORR	No		<input type="radio"/>	<input type="radio"/>
Comments:					
Training Office	TAMARA D BOLDEN (Show All)	No		<input type="radio"/>	<input type="radio"/>
Comments:					
NSSC Procurement	ROBIN E SCHENCK (Show All)	No		<input type="radio"/>	<input type="radio"/>
Comments:					
<input type="button" value="Apply Changes"/> <input type="button" value="Reset"/>					

Figure 19. Approval Screen with First Step Approved



To edit the request:

1. Click the **Edit Request** link to open the form in a separate browser window.
2. Make changes to the external training request form as appropriate.
3. Click **Apply Changes** at the bottom of the screen to return to the SF-182 Requests tab of the learner record.

Withdrawing a Training Request Before Final Approval

Any time before final approval, the learner or administrator can withdraw the training request. This action does not remove the external training request from the learner record. The request status is *Withdrawn* and the learner can re-submit the request at a later time. If the learner re-submits the request, the system associates a new tracking ID.

Withdrawing a request in SATERN does not cancel the event with the vendor, so the learner should notify the Training Office about the change of plans.

When a learner or administrator withdraws the request:

- ◆ No notification is sent
- ◆ The request leaves the current approver's queue
- ◆ The learner can click the **Resubmit** button to create a new, editable copy of the request, beginning at step 1 of the approval process

The external training request form does not have an automatic notification capability to send a notice to the user, supervisor or training office when a SATERN Administrator withdraws a user's SF-182 request.

NASA Business Rule

The administrator who withdraws the user should send a note to the user, the supervisor, and the training coordinator advising them of the action and the reason.

After Submission Approval but Prior to Verification Start

If the external training request has been approved but the verification part of the process has not yet been started, the admin may click **View Request** to view the form in a separate browser window (Figure 20). Click **Back to SF-182 Requests** to return to the SF-182 Requests tab of the learner record.

User Name: ldcoury		Name: DAVIS-COURY, LANE		Request ID: 49917		Back to SF-182 Requests	
View SF-182 Portable Version							
Authorization, Agreement & Certification of Training Request ID: 49917							
SECTION A. TRAINEE INFORMATION							
B. Record Action							
Add							
A.1. Applicant's Name							
Last Name		First Name		Middle Initial		First Five Letters of Last Name	
DAVIS-COURY		LANE				DAVIS	
A.4. Home Address							
Street Address				* A.5. Work Phone		* A.6. Position Level	
(650) 604-6335				<input type="radio"/> a. Non-supervisory		<input type="radio"/> b. Manager	
City		State / Province		Postal Code		Country	
						<input type="radio"/> c. Supervisor	
						<input type="radio"/> d. Executive	
A.7. Organization Mailing Address							
* Organization				* A.8. Work Fax		* A.9. Work Email Address	
OSHA TRAINING INSTITUTE CENTER				555 212 3456		ldcoury@kso.com	
* Address							
P.O. BOX 93686							
* City		* State / Province		* Postal Code			
ATLANTA		GA		20277			

Figure 20. View Request

Editing an Approved Request

The NSSC has a workflow that allows them to edit a request after final approval. They are the only administrators who will see a link for **Edit SF-182 Request** after the request has been approved and/or verified (Figure 21).

Surveys	SF-182 Requests	Standard Options			
Catalog Preview	Preferences	Approval Role	Approvals	Organization Initiatives	Succession Planning
Cpty Profiles	Competencies	Registration	Requests	Online Status	Commerce
Summary	Phone Numbers	Custom Fields	Learning Plan	Learning History	Curricula

Edit the SF-182 for the User

Viewing Options: Sort By:

Request ID	Title	Status	Pending Approval Actions	Action
49917	INTRODUCTION TO PROJECT MANAGEMENT	Approved	None	View Request Edit SF-182 Request Transfer Request Verify Edit Custom Columns

[New External Request](#)

Figure 21. Link to Edit SF-182 Request after Final Approval



CONCLUSION

In this lesson, you learned how to create a new external training request and view an existing one as either an admin or a learner.

You should now be able to:

- Create a new request as a learner (or admin)
- View an existing request as a learner (or admin)
- Edit an existing request as an admin



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

All of the fields must be filled in before the request form may be submitted.

2. True or false:

To print the form, the learner or admin should click the **Printable Version** link.

3. True or false:

When editing an external training request, an admin usually has the option to approve the request.

Lesson 3:

Submitting and Verifying the External Training Request

The goal of this lesson is to provide the steps necessary to teach you how to submit and verify external training request in SATERN.

OBJECTIVES

Upon completion of this lesson, you will be able to:

- Submit an external training request
- Verify an external training request
- Approve an external training request
- Describe several scenarios for processing requests when there is a change to the learner's plans

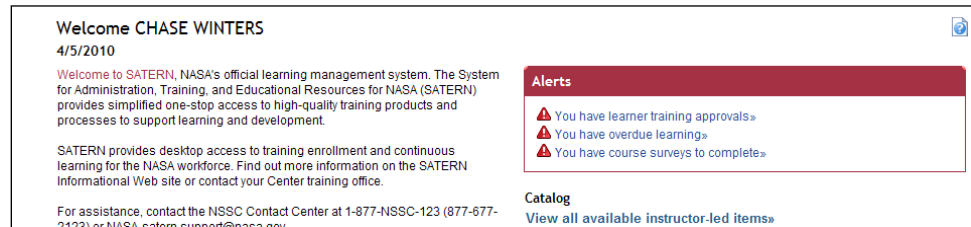
SUBMITTING AN EXTERNAL TRAINING REQUEST

Once a learner submits an external training request, the external training request Submission Process is initiated. The person or persons who have approver rights must log in to the SATERN learner interface and approve or deny the request.

To approve a request:

1. Log in to the SATERN learner interface.

2. Navigate to **Personal > Approvals**, or click **You have Learner training approvals** in the Alerts section of the Home page (Figure 22).



Welcome CHASE WINTERS
4/5/2010

Welcome to SATERN, NASA's official learning management system. The System for Administration, Training, and Educational Resources for NASA (SATERN) provides simplified one-stop access to high-quality training products and processes to support learning and development.

SATERN provides desktop access to training enrollment and continuous learning for the NASA workforce. Find out more information on the SATERN Informational Web site or contact your Center training office.

For assistance, contact the NSSC Contact Center at 1-877-NSSC-123 (877-677-2123) or NASA.satern.support@nasa.gov.

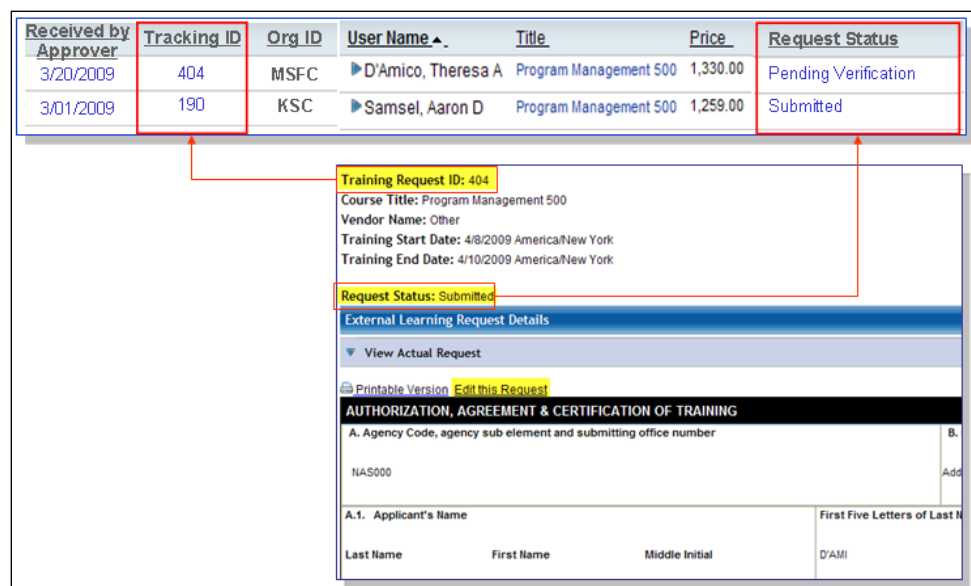
Alerts

- ⚠ You have learner training approvals»
- ⚠ You have overdue learning»
- ⚠ You have course surveys to complete»

Catalog
[View all available instructor-led items»](#)

Figure 22. Home Page

3. Locate the tracking ID on the approvals list.
4. Select the linked tracking ID to open the request details, if needed (Figure 23).



Received by Approver	Tracking ID	Org ID	User Name	Title	Price	Request Status
3/20/2009	404	MSFC	D'Amico, Theresa A	Program Management 500	1,330.00	Pending Verification
3/01/2009	190	KSC	Samsel, Aaron D	Program Management 500	1,259.00	Submitted

Training Request ID: 404

Course Title: Program Management 500
Vendor Name: Other
Training Start Date: 4/8/2009 America/New York
Training End Date: 4/10/2009 America/New York

Request Status: Submitted

External Learning Request Details

[View Actual Request](#)

[Printable Version](#) [Edit this Request](#)

AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING

A. Agency Code, agency sub element and submitting office number
NAS000

B. Add

A.1. Applicant's Name
Last Name First Name Middle Initial First Five Letters of Last Name
D'AMI

Figure 23. View of Request Details and Approvals List

- On the *Pending Reviews and Approvals* screen, locate the request to approve and click the **Approve** radio button (Figure 24).

Pending Reviews and Approvals

This view shows you all of the review and approval actions you have been asked to perform. It is divided into two primary sections: reviews and approvals for performance management activities, such as competency assessments (only if available); and approvals for training requests. You may switch between sections by clicking on the appropriate section header. Within each section you will find a list of specific reviews or approvals you are being asked to perform, categorized by action type.

Performance Management (0) Training (2)

Training

Internal Training (0)

No items were found using this search criteria.

External Training (2)

☒ Enter Reasons for Approvals or Denials

☒ All ☐ Direct Reports Only

Next

Received By Approver	Tracking Request ID	Org ID	User Name	Learner Name	Title	Price	Request Status	Action [Approve/Deny/Skip]
4/5/2010	49939	HQ-OSHA TRAIN	Idcoursy	DAVIS-COURY, LANE	PMP Certification Prep	1,100.00	Submitted	<input type="radio"/> Approve <input type="radio"/> Deny <input checked="" type="radio"/> Skip
4/5/2010	49940	HQ-OSHA TRAIN	Idcoursy	DAVIS-COURY, LANE	Leading Effective Change	1,100.00	Submitted	<input type="radio"/> Approve <input type="radio"/> Deny <input checked="" type="radio"/> Skip

Figure 24. Learner Interface: Personal > Approvals

- Click **Next**.
- Enter an approval reason, if necessary.
- Click **Next**.
- Review the displayed information.
- Click **Confirm** to complete the process (Figure 25).

Pending Reviews and Approvals

Approve or Deny → Approval Reasons → Denial Reasons → Confirm → **Success**

Start Over...

Success

You have successfully completed the employee approval and denial process. E-mail notifications have been sent to all affected learners.

Figure 25. Request Approved



Note: Click **Start Over...** to return to the *Pending Reviews and Approvals* screen.

For approved requests:

- ◆ If there is another approver at the same level as this approver, the approval leaves his/her queue.
- ◆ If there is another step required in the approval process, an e-mail is sent to the next approver in the process and to the learner informing them of the progress on the request.
- ◆ If this is the final step in the approval process, a notification is sent to the learner indicating that his/her request has received final approval.
- ◆ The learner's request status indicates they are *Pending Verification* (Figure 26).

Request, Authorization, Agreement & Certification of Training				
Below is a list of all of your SF-182 Requests. Click the Request ID for more information about the request. Click Copy Request or Withdraw Request button and click Go to Copy or Withdraw from an SF-182 Request. Click the New Request button to initiate a new request.				
External Training Requests			Viewing Options:	Approved
Request ID	Title	Status	Pending Approval Actions	Action
49917	INTRODUCTION TO PROJECT MANAGEMENT	Approved	Pending Verification	Copy Request Verify
				New External Request

Figure 26. Pending Verification

For denied requests:

- ◆ The learner receives an email notification that includes the reason that the request was denied.
- ◆ No other notifications are sent.
- ◆ The request remains in the learner record and can be re-submitted at a later time, creating a copy of the form with a new tracking ID.

VERIFYING AN EXTERNAL TRAINING REQUEST

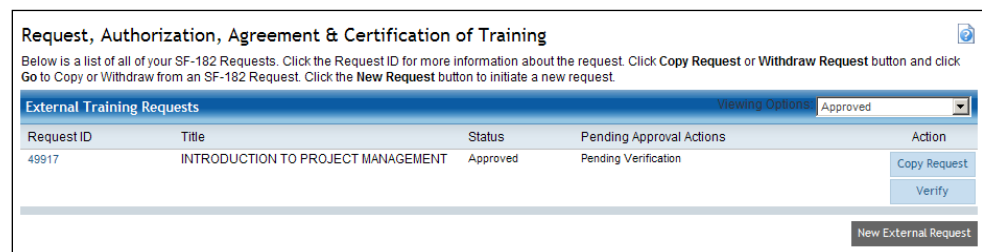
Once a learner has completed an external training request and the end date on the request has passed, the learner can submit verification of his/her attendance for approval.

The process flow for verifications includes:

1. Learner receives *Verification Reminder* notification after end date of training has passed.
2. Learner completes verification form and submits for approval. If this is an academic course, the learner must also provide a grade to the training office.
3. Verification follows one-step approval process and goes to NSSC for SATERN.
4. Upon approval of the verification, the event is recorded in the learner's Learning History.
5. Events that are completed as attended will send a data feed/trigger to Metrics that Matter (MTM) to send the follow-up survey.

To request verification:

1. Navigate to **Learning > External Training Requests** (Figure 27).



Request, Authorization, Agreement & Certification of Training				
Below is a list of all of your SF-182 Requests. Click the Request ID for more information about the request. Click Copy Request or Withdraw Request button and click Go to Copy or Withdraw from an SF-182 Request. Click the New Request button to initiate a new request.				
External Training Requests				Viewing Options: Approved
Request ID	Title	Status	Pending Approval Actions	Action
49917	INTRODUCTION TO PROJECT MANAGEMENT	Approved	Pending Verification	Copy Request Verify

[New External Request](#)

Figure 27. External Training Request Listed

2. Click **Verify**.



The *Request, Authorization, Agreement & Certification of Training Verification* screen displays (Figure 28).

Request, Authorization, Agreement & Certification of Training
Verification
Training Request ID : 49917

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING

* V.1. Course Was Completed

☒ Yes ☐ No

V.2. Comments/Explanation

V.3. Actual Course Dates (MonthDayYear) (MM/DD/YYYY)

a.Commenced: 3/1/2010

b.Complete: 3/3/2010

V.5. Academic Score

V.6. All sessions were attended

☒ Yes ☐ No

V.7. Comments/Explanation

Submit

Figure 28. Learner Interface: Verification of External Training Request

3. Fill in the appropriate fields.
4. Click **Submit**.

The *Approval Submission* screen displays (Figure 29).

Approval Submission
Submit for Approval
< Back

The item/request selected requires approval using the steps listed below.

Any step that do not have a user listed must have a name filled in before the request can be submitted.

Approval Step	Approvers
NSSC	NSSC (Show All)

Submit

Figure 29. Learner Interface: Approval Submission Screen

5. Review the approval process.
6. Click **Submit**.

The verification screen displays (Figure 30).

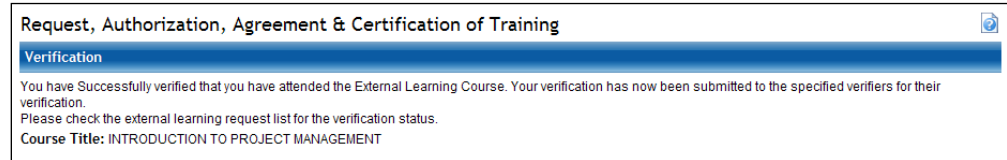


Figure 30. Learner Interface: Verification

7. Review the verification message.
8. Navigate to **Learning > External Training Requests** from the top menu.
9. Note the status of the external training request for which the verification was submitted (Figure 31).

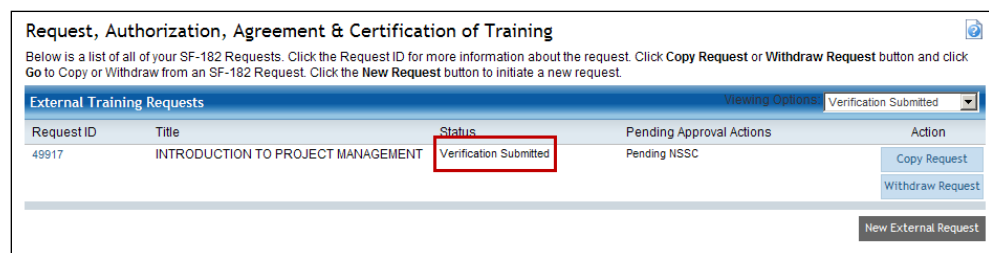


Figure 31. Learner Interface: External Training Request Status

APPROVING THE VERIFICATION REQUEST

Once the learner has submitted the verification request, the Verification Approval Process is initiated. The person or persons who have approver rights must log in to the SATERN learner interface and approve or deny the verification request.

For NSSC administrators to approve the verification:

1. Learner submits verification, including any relevant paperwork.
2. NSSC approver(s) receive notification that request is awaiting approval.

3. NSSC follows business rules to confirm attendance and final grade, if applicable.
4. NSSC admin logs in to learner side or admin side and approves or denies the request.

To approve an External Training Request Verification Request:

1. Log in to the SATERN learner interface.
2. Navigate to **Personal > Approvals**, or click **You have Learner training approvals** in the Alerts section of the Home page (Figure 32).

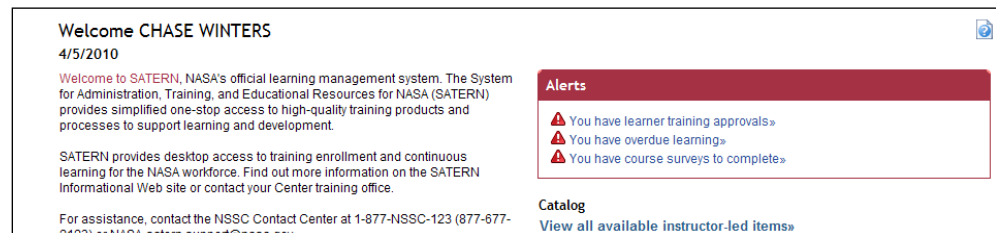


Figure 32. Home Page

3. On the *Pending Reviews and Approvals* screen, locate the request to approve and click the **Approve** radio button (Figure 33).

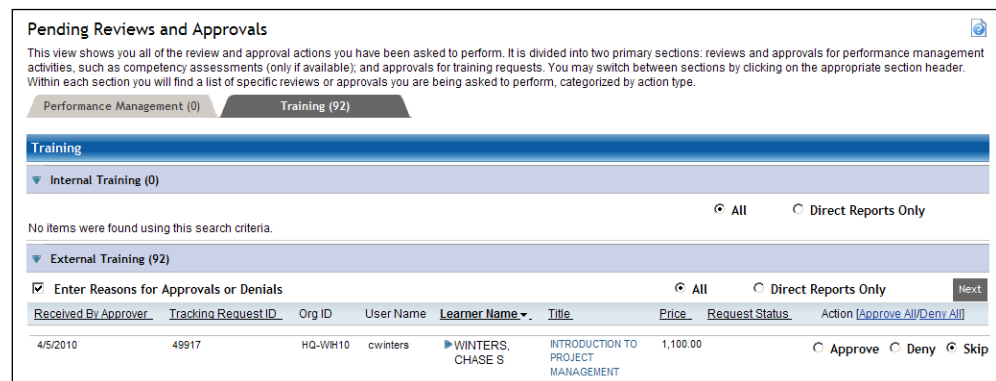


Figure 33. Pending Reviews and Approvals Screen

4. Click **Next**.

5. Enter an approval reason, if necessary.
6. Click **Next**.
7. Review the information displayed.
8. Click **Confirm** to complete the process (Figure 34).

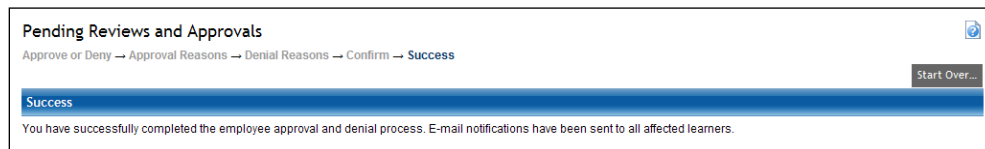


Figure 34. Request Approved



Note: Click **Start Over...** to return to the Pending Reviews and Approvals screen.

Once the Verification Approval Process has been successfully completed, a Learning History record is created for the learner. The Learning History record is captured as an external event (Figure 35).

The screenshot shows a web interface titled "Learning History". Below the title is a description: "The Learning History page shows you a summary list of the items that you have completed and the dates the items were completed. To view the details of a specific item in your learning history, simply click the corresponding title of the item. You can sort the list by the Title of the items or the Completion Date of the items on the list." Below this is a table with the following data:

Title	Type	Completion Date	Status	Action
INTRODUCTION TO PROJECT MANAGEMENT	WORKSHOP	3/3/2010 12:00 AM EST	Completed	Print Completion Certificate
CROSS VERSION ADVANCED EXCEL MODELING SKILLS	WORKSHOP	3/31/2010 03:11 PM EST	Completed	Print Completion Certificate
RECORDS MANAGEMENT FOR IT PROFESSIONALS	WORKSHOP	3/29/2010 03:03 PM EST	Completed	Print Completion Certificate
MICROSOFT OFFICE 2000 - BEGINNING EXCEL	COURSE	3/24/2010 05:00 PM EST	Substitute	Print Completion Certificate

Figure 35. Learning History

Notice that the learner cannot print a certificate of completion based on external learning. NASA expects the training vendor to provide the certificate.

If the verification is denied, no learning history is entered for this event. The request continues to be associated with the learner record and can be re-submitted at a future date.

VERIFYING AN EXTERNAL REQUEST FOR A LEARNER

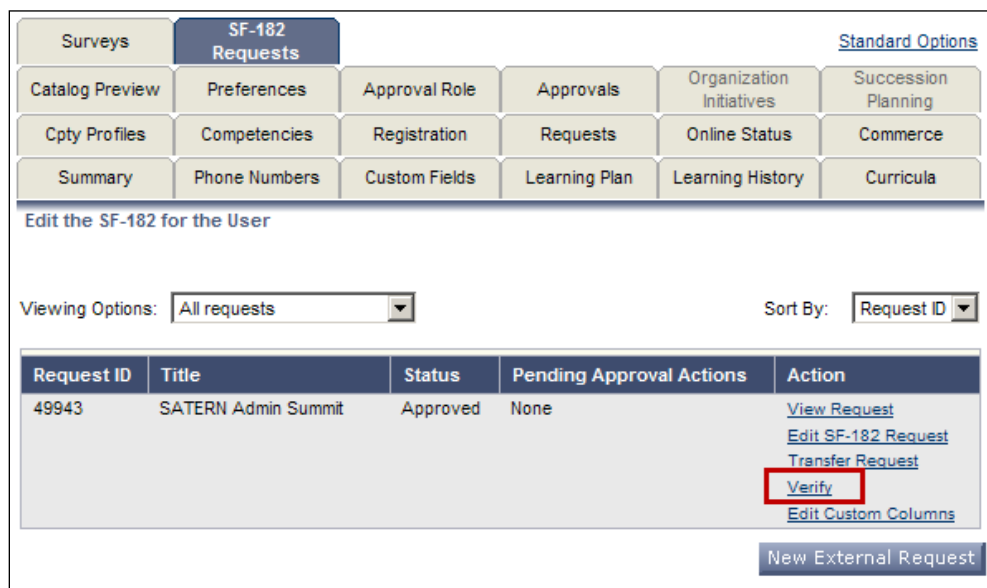
A SATERN admin can verify attendance on behalf of a learner. Typically, this is not necessary since learners complete exactly the same verification form on the learner side as you complete on the admin side.

Submitting a Verification for Approval

Scenario: The learner is out of the office without access to SATERN. An admin can verify the learner's attendance at an event and submit the verification for approval.

To verify a learner's attendance at an event:

1. Access the learner record in edit mode.
2. Select the **SF-182 Requests** tab and locate the event.
3. Click the **Verify** link next to the request (Figure 36).



The screenshot shows the SATERN interface with the 'SF-182 Requests' tab selected. Below the navigation tabs, there is a section titled 'Edit the SF-182 for the User'. This section includes 'Viewing Options' set to 'All requests' and 'Sort By' set to 'Request ID'. A table lists the requests, with the first row showing a request ID of 49943, titled 'SATERN Admin Summit', with a status of 'Approved' and no pending approval actions. The 'Action' column for this request contains several links: 'View Request', 'Edit SF-182 Request', 'Transfer Request', 'Verify' (highlighted with a red box), and 'Edit Custom Columns'. At the bottom right of the table, there is a button labeled 'New External Request'.

Request ID	Title	Status	Pending Approval Actions	Action
49943	SATERN Admin Summit	Approved	None	View Request Edit SF-182 Request Transfer Request Verify Edit Custom Columns

[New External Request](#)

Figure 36. Learner Record > SF-182 Request > Verify Link



4. Complete the fields in the verification form (Figure 37) and click **Submit**.

Verification Form

REQUEST, AUTHORIZATION, AGREEMENT & CERTIFICATION OF TRAINING	
* V.1. Course Was Completed	
<input checked="" type="radio"/> Yes <input type="radio"/> No	V.2. Comments/Explanation <div></div>
V.3. Actual Course Dates (MonthDayYear) (MM/DD/YYYY)	
a. Commenced: 12/6/2009	V.5. Academic Score <div></div>
b. Complete: 12/6/2009	
V.6. All sessions were attended	
<input checked="" type="radio"/> Yes <input type="radio"/> No	V.7. Comments/Explanation <div></div>

Submit

Figure 37. Verification Form

The verification will be submitted for approval.

OTHER SCENARIOS

What happens if the learner did not attend the event or complete the training?

A learner can verify the event as “Not Completed”. This event will not be entered into learning history. The request will remain on the learner record as verified, but not completed.

Administrators can run a tuition report specifically on the status “Verified as not completed” (see Appendix).



CONCLUSION

In this lesson, you learned how to describe the submission, verification, and approval processes for external training request.

You should now be able to:

- Submit an external training request
- Verify an external training request
- Approve an external training request
- Describe several scenarios for processing requests when there is a change to the learner's plans



LESSON CHECK

Use what you learned in this lesson to answer the following questions.

1. True or false:

The learner's supervisor is always the first learner to approve (or deny) a submitted external training request.

2. True or false:

SATERN uses a four-step approval process for the approval of verifications submitted by learners.



Notes



Course Summary

External training request allow employees to request training that is not in SATERN, such as attending a conference or taking a course at a university. The external training request process enables administrators and/or supervisors to create, verify, and submit external learning events for employees. Administrators are able to edit external training requests and run reports on the request status.

You should now be able to:

- Describe the external training request
- Create and submit a new external training request
- Verify and approve external training request
- Run external training request reports



Notes

Appendix: Running External Training Request Reports

There are three SATERN administration reports related to external training request:

- External Request Data Report
- External Request Tuition Report
- Approvals Status Report
- For additional NASA custom reports - Refer to SATERN Info Site > SATERN Standard and Custom Reports
 - https://saterninfo.nasa.gov/documents/SATERN_UPDATE/SATERN%20Reports%2012_09_2009.xls

EXTERNAL REQUEST DATA REPORT

The External Request Data report provides data on external training requests that learners have requested. It allows filtering by learner and date range. Administrators can also select which data to include in the report, such as:

- ◆ Personal data
- ◆ Vendor data
- ◆ Financial data

To generate the External Request Data report:

1. Log in to the SATERN admin interface.

2. Navigate to **Reports** in the top menu frame.
3. Search for and locate **External Request Data** (Figure 38).

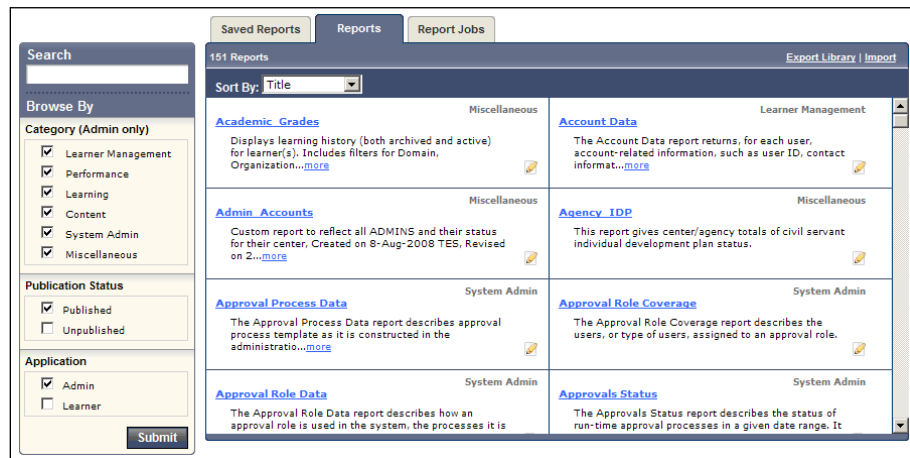


Figure 38. Generating the External Request Data Report

4. Click the **External Request Data** report title.

The Run External Request Data screen displays (Figure 39).

The screenshot shows the 'Run External Request Data Report' screen. It includes fields for Report Title, Report Header, Report Footer, Report Destination, and Report Format. There are also checkboxes for 'Mask Learner IDs', 'Case sensitive search', 'Include Personal Data', 'Include Vendor Data', and 'Include Financial Data'. The 'Run Report' button is visible at the bottom right.

Figure 39. Run External Request Data Screen

5. Edit the report title, header, and footer as appropriate.
6. Select the report destination and report format.
7. Select the learner(s).
8. Enter a date range.
9. Check the desired checkboxes for the information to include in the report.
10. Click **Run Report** to display the report in a separate browser window (Figure 40).



Note: You can also schedule this job to run during off-peak hours by clicking **Schedule Job**.

Request	
Learner Name :	WINTERS, CHASE S
Social Security Number :	
User ID :	*****
Date of Birth :	
Request Details	
Vendor Name :	ABC Technologies
Course Objectives :	LEARN ABOUT ...
Complete Date :	3/3/2010 04:30 PM America/Indianapolis
Training Source :	
Training Sub-type :	
Training Designation :	
Training Accreditation Required Indicator :	
Continued Service Agreement Required Indicator Expiration Date :	
Activity Title :	INTRODUCTION TO PROJECT MANAGEMENT
Start Date :	3/1/2010 08:00 AM America/Indianapolis
Training Purpose :	CMS0004:Mission Execution
Training Type :	
Training Delivery :	
Training Credit Type :	
	Continued Service Agreement Required Indicator :
Personal	
Position Level :	
Office Number / Office Fax :	

Figure 40. External Request Data Report

EXTERNAL REQUEST TUITION REPORT

The External Request Tuition report provides data entered onto the form in the Tuition field (field C.1.a on the external training request form). This report allows you to display the amount of money spent on tuition during a given date range. There are several filtering options for this report.

To generate the External Request Tuition report:

1. Log in to the SATERN admin interface.
2. Navigate to **Reports** in the top menu frame (Figure 41).

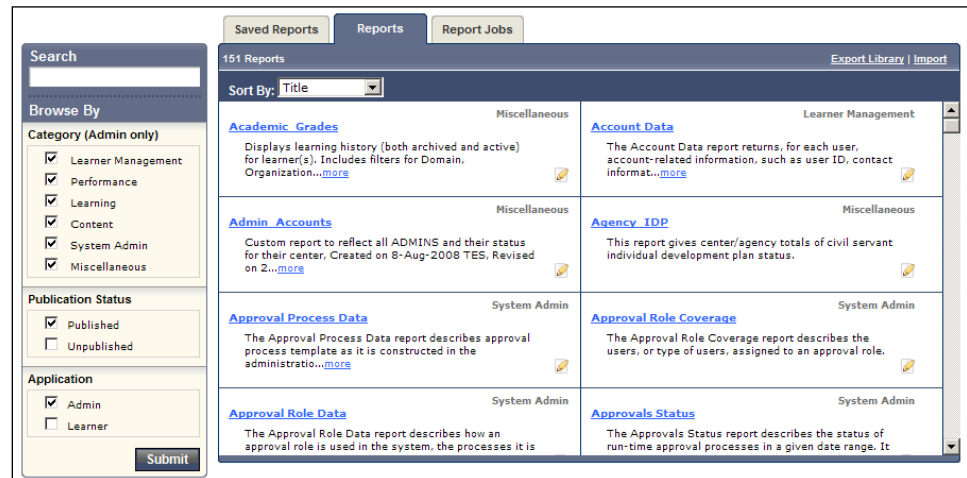


Figure 41. Generating the External Request Tuition Report

3. Search for and locate **External Request Tuition** report.



Note: Use the search checkboxes on the left to narrow the list of reports listed on the Reports tab at the right.

4. Locate the **External Request Tuition** report from the Reports list (Figure 42).

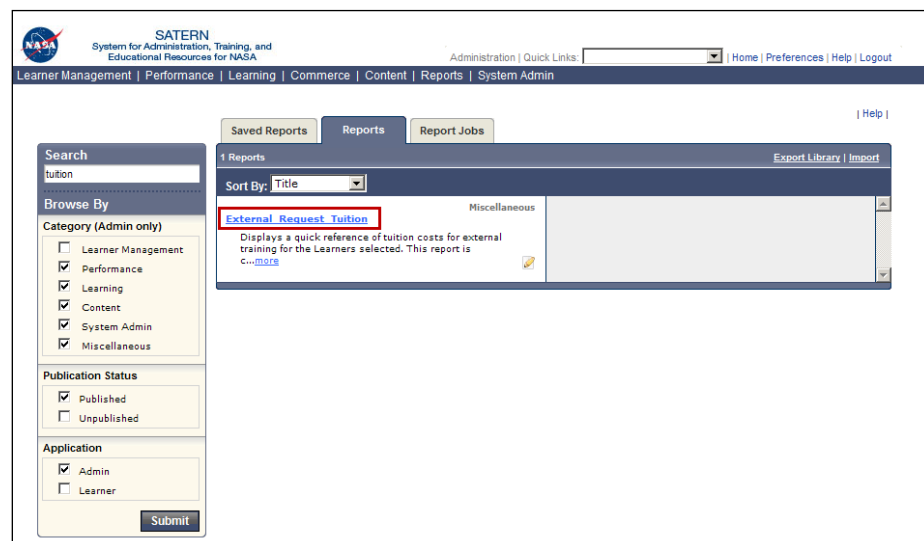


Figure 42. Generating the External Request Tuition Report

- Click the **External Request Tuition** report title.

The Run Report screen displays (Figure 43).

External Request Tuition [Browse](#) [Help](#)

[> Edit Report](#)

Run External Request Tuition

Report Title:

Report Header:

Report Footer:

Report Destination: ☒ Browser ☐ Local File

Report Format: ☐ XML ☐ CSV ☒ HTML ☐ PDF

☒ Mask Learner IDs

Case sensitive search: ☐ Yes ☒ No

Learner:

External Learning Request Status:

Vendor:

Activity Title:

Fund/Chargecode:

Tuition Greater Than:

Start Date between:

and:

Group By: ☐ Activity Title ☐ Fund/Chargecode ☐ Learner ☐ Tuition ☒ Vendor Name

Sort By: ☒ Activity Title ☐ Fund/Chargecode ☐ Learner ☐ Start Date ☐ Tuition

☐ Vendor Name

[Run Report](#) [Schedule Job](#) [Save Report](#) [Reset](#)

Figure 43. Run Report Screen

- Enter the report title, header, and footer as appropriate.
- Select the report destination.
- Select the report format.

9. Select learner(s) on which to run the report.
10. Select the External Training Request Status.
11. Enter other desired criteria.
12. Enter a date range.
13. Select the desired *Group By* and *Sort By* options.
14. Click **Run Report** to display the report in a separate browser window (Figure 44).

External Request Tuition Report

Vendor Name

Vendor Name:ABC Technologies

Request

Learner Name	User Name	Loc - Org	Status	Activity Title	Submitted	Start Date	Fund/Chargecode	Tuition (\$)
WINTERS, CHASE S	*****	HQ-WIH10	Completed and Verified	INTRODUCTION TO PROJECT MANAGEMENT	4/5/2010	3/1/2010		1,100.00
Total								1,100.00

Vendor Name

Vendor Name:Columbia College

Request

Learner Name	User Name	Loc - Org	Status	Activity Title	Submitted	Start Date	Fund/Chargecode	Tuition (\$)
WINTERS, CHASE S	*****	HQ-WIH10	Withdrawn	Program Management 500	4/5/2010	4/26/2010		1,700.00

Figure 44. External Request Tuition Report

APPROVAL STATUS REPORT

The Approvals Status Report describes the status of run-time approval processes in a given date range. It returns the details of approval processes as they currently exist in the SATERN system.

To generate the report:

1. Log in to the SATERN admin interface.
2. Navigate to **Reports** in the top menu frame.

3. Search for the **Approval Status Report**.
4. Click the **Approval Status Report** title.
5. Enter all of the report details and criteria as necessary.
6. Scroll to the bottom of the screen and locate the External Requests field (Figure 45).

Figure 45. External Requests Search Field

7. Click the **External Requests Filter by Criteria** icon.

The Create External Requests Filter for Approvals Status screen displays (Figure 46).

Figure 46. Create External Requests Filter for Approvals Status Screen

8. Enter search filter criteria.
9. Click **Search**.
10. Click the **Select** checkbox next to the external requests to search.
11. Click **Submit Selection**.
12. Click **Submit Criteria**.
13. Click **Run Report** on the Run Approvals Status screen.

The Approvals Status Report displays in a separate browser window (Figure 47).

Approvals Status Report												
Domain												
Domain ID:			HQ-W				Total:			1		
Request												
User Name	Learner Name	Type	Request ID	Title	Submitted	Start	End	Registration Cut-off Date	Approval ID	Status	Step	Approver
*****	WINTERS, External CHASE S	Verification Request	49917	INTRODUCTION TO PROJECT MANAGEMENT	4/5/2010	3/1/2010	3/3/2010		235618	Approved	1	PARKER, ANN B

Figure 47. Approvals Status Report